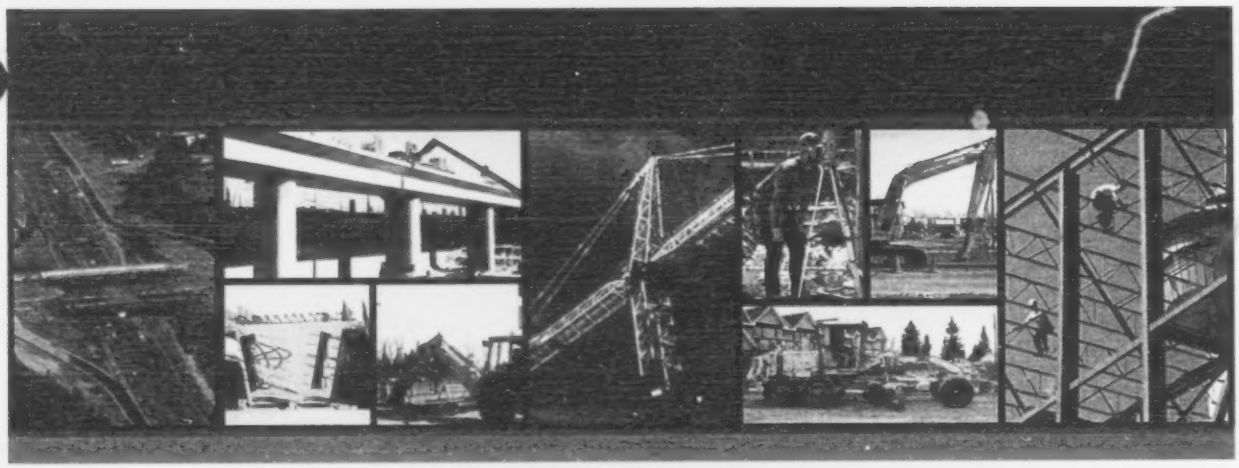

Industrial Area Growth

Information Update
2005-2009

July 2005

www.calgary.ca

THE CITY OF
CALGARY
LAND USE PLANNING & POLICY

INDUSTRIAL AREA GROWTH: INFORMATION UPDATE 2005-2009

PUBLISHING INFORMATION

TITLE:	Industrial Area Growth: Information Update 2005-2009
AUTHOR:	Growth Management Technical Team
STATUS:	Final Version
PRINTING DATE:	July 2005
ADDITIONAL COPIES:	The City of Calgary Land Use Planning & Policy Information Centre #8115 P.O. Box 2100, Postal Station "M", Calgary, Alberta T2P 2M5 Phone: (403) 268-5333 Fax: (403) 268-1319 Website: www.calgary.ca/planning/landuse go to: Publications

ACKNOWLEDGEMENTS

CITY OF CALGARY

Waterworks Wastewater & Drainage Corporate Properties & Buildings	Hugh Costello Karen Wichuk Sandy Menzies, Scott Hooper George Nieuwenhuis
Land Use Planning & Policy	Glen Radway Jim Francisco Diane Pearson Decker Shields
Technical Services	Jamie Ager Jake Kodak Marc Hummel Kim Hathaway

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FOREWORD: THE CITY'S GROWTH MANAGEMENT INFORMATION PRODUCTS

Calgary's growth-related challenges are significant, but so are the benefits of orderly, well-managed and equitably-financed growth. The City of Calgary is responsible for managing and coordinating the planning and investment needed to accommodate growth.

To assist in this management, The City has developed a research program to analyse growth expectations and coordinate the plans for infrastructure and services to support that growth. One of the products from this work is a series of information documents:

- *Suburban Residential Growth Information Update* (annual);
- *Accommodating Growth: Municipal Capital Investment Framework* (annual); and
- *Industrial Growth Information Update* (annual / semi-annual as required).

Together these documents provide City Council, the Administration, private developers and the public with the base information they need to plan for growth and change. The documents share some common information but each has a specialized focus. The following chart summarizes the content of these documents and shows how the current document, *Industrial Area Growth: Information Update*, fits into the overall package of information.

For business development, investment and site selection inquiries please contact Calgary Economic Development at (403) 221-7831 or 1 (888) 222-5855. For more information please visit their website at:

www.calgaryeconomicdevelopment.com

INDUSTRIAL AREA GROWTH: INFORMATION UPDATE 2005-2009

	SUBURBAN RESIDENTIAL GROWTH INFORMATION UPDATE	ACCOMMODATING GROWTH: MUNICIPAL CAPITAL INVESTMENT FRAMEWORK	INDUSTRIAL GROWTH INFORMATION UPDATE
FOCUSES ON:	**Suburban residential development in the last 5 years and the next 5 years**	**City's capital budget plans for suburban residential growth in the next 20 years.**	**Industrial land supply and growth expectations.**
PROVIDES CURRENT INFORMATION ON:	• City approach to managing residential land supply • inventory of suburban residential land supply including: ▫ planning approval status ▫ water and wastewater servicing ▫ plans for future water and wastewater service extensions ▫ transportation improvements • historical suburban residential development activity • current suburban growth dynamics • method of forecasting growth locations	• City approach to managing residential land supply • Overview of financing infrastructure required for growth • City's overall capital budget • Budget and location of all City capital projects related to growth from the current City budget • Operational framework and the process followed to plan for new development	• City approach to managing industrial land supply • Inventory of industrial land supply including: ▫ planning approval status ▫ water and wastewater servicing ▫ plans for future water and wastewater service extensions • Current industrial development activity • Listing of planned City growth related transportation projects. • Recommendations for industrial policy studies and research.
OUTLINES FUTURE EXPECTATIONS FOR:	• 5-year population and housing forecasts by city sector • the balance between existing serviced land supply and the expected demand.	• 5, 10, 15 and 20 year population and housing forecasts by city sector • City capital expenditures related to growth for the next 5, 10 year and beyond (where possible) by area of operation and city sector	• 5 year forecast of industrial employment by industrial area • related land demand estimates

PART 1: INDUSTRIAL LAND SUMMARY

CITYWIDE INDUSTRIAL LAND SUPPLY AND DEMAND

The City of Calgary has 47 sections (12,029 hectares) of industrial land supply within its municipal boundary. Of this total 68% (8,225 hectares) is developed, leaving 3,804 hectares of vacant gross land supply available for future development.

Over the past year 71 hectares (175 acres) of industrial land have been developed. This rate of absorption is lower than the forecast long term industrial land absorption estimates of approximately 120 hectares per year. (Last years high absorption of 165 hectares and this years 71 hectares, result in a two year average of 118 hectares). The spatial allocation of this activity by major industrial area for 2004 is:

Industrial Area	Land Absorbed
North/Northeast	9
Southeast	53
Central	7
Northwest	2
Total	**71**

Based on the available land supply, and anticipated long-term absorption average rates of 120 hectares of land per year, Calgary has a total of 32 years of land supply within its jurisdiction. The following table indicates the remaining years of supply of immediate (fully serviced), short-term (partially serviced) and long-term (reserve) lands.

	Immediate Land Supply	Short Term Land Supply	Long Term Land Supply	Total
Total Supply	983	763	2,057	3,804
Years of Supply Remaining *	8.2	6.4	17.1	31.7

* Based on the estimated absorption rate of 120 hectares per year

THERE IS A SUFFICIENT FUTURE INDUSTRIAL LAND SUPPLY: BUT THREATENING SIGNS ARE ON THE HORIZON

Three decades of potential industrial land supply is required by Council policy. Currently there is sufficient raw land to meet these requirements. However, a number of factors may result in significant reductions in these supply estimates. The development of Forest Lawn Creek and affiliated park/regional pathway areas could significantly reduce the amount of land available in the southeast industrial area for industrial uses. The potential loss of major roadway interchange connections with the future East Freeway at 61 Avenue S.E. and 106 Avenue S.E. could, potentially, limit future industrial employment capacity and land use densities in the entire southeast industrial growth area east of 52 Street S.E.

In addition to these known events, future demand for industrial land by non-industrial users is expected to continue. Commercial and institutional use of industrial land continues to increase. In 2004 84% of all building permit activity in industrial areas was for commercial projects, while 83% of all building permit value ($154.5 million) was for some form of commercial development (total building permit value on industrial lands in 2004 was $185.2 million). Extensive commercial development of industrial land drives up serviced industrial land costs, increases potential conflicts from a broader range of incompatible uses, and increases traffic loads on roads designed, primarily, for industrial uses.

CALGARY'S INDUSTRIAL LAND SUPPLY IS A LIMITED RESOURCE

Annexing additional lands in a timely manner, prior to significant subdivision and fragmentation of future reserve lands, is expected to become increasing more difficult. Unserviced and self serviced industrial development, similar to the areas developing adjacent to the city edge in the southeast (east of 84 Street S.E.) are expected to expand, further encumbering The City's ability to plan as a 'unicity' for industrial growth. Ongoing monitoring of the land supply situation, and resulting policy guidance, is required to help ensure that existing and potential inventories of industrial land, as mandated by City Council, remain for industrial use and Calgary's continued economic development.

SHORT-TERM INDUSTRIAL LAND SUPPLY IS CONSTRAINED

Although there is sufficient long-term industrial land holdings, there are significant short-term serviced land constraints. Serviced industrial land for owner/operators is practically non-existent. Serviced industrial land held by developers for build-to-suit lease product is available, but land and development costs are rising rapidly. The demand for industrial land is spilling outside the city limits, with significant industrial development occurring within the M.D. of Rockyview in a number of limited service industrial parks. Until the completion of the Shepard Constructed Wetlands project, this trend is expected to accelerate.

PART 2: INDUSTRIAL LAND SUPPLY AND DEMAND

The four major industrial areas include: the North/Northeast Industrial Area; the Southeast Industrial Area; the Central Industrial Area and the Northwest Industrial Area (including the Calgary Research and Development Park). These industrial areas are shown on Map 1.

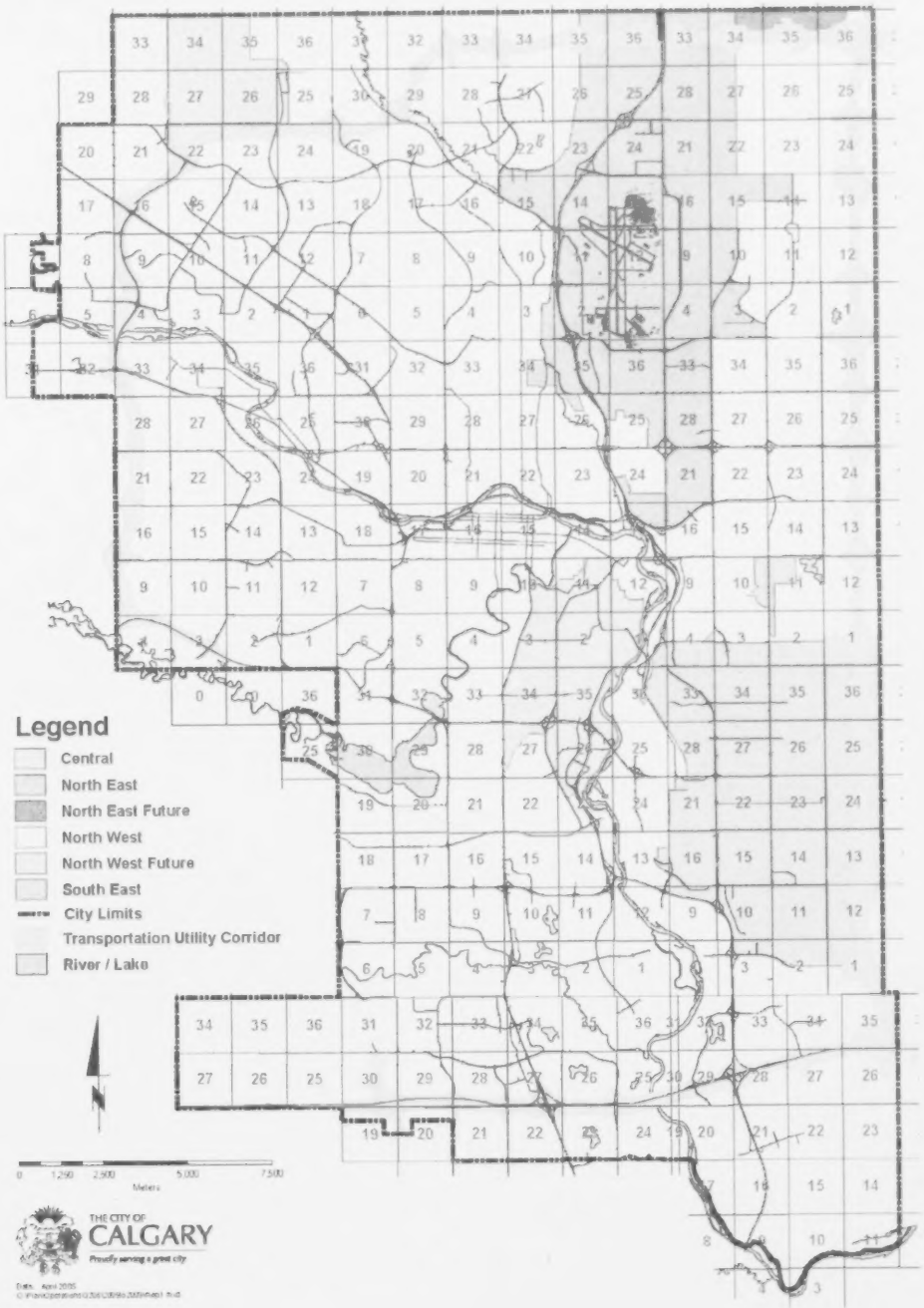
LAND SUPPLY

An evaluation of the current vacant land supply by category was conducted in the first quarter of 2005. The previous year's inventory, building permits processed over the past year, supplemented with field surveys and discussions with various industrial land stakeholders was used to determine the extent of industrial development that has occurred over 2004. Pending subdivision applications (applications received but not fully 'processed') are provided for the January 1, 2005, to March 30, 2005, period. Updates to the year to year absorption of industrial land have been highlighted in this year's report, to better illustrate areas of recent industrial building permit activity. Absorption of industrial land, includes:

- all land that is redesignated to non-industrial uses at the subdivision/outline plan stage; or,
- vacant land parcels with a building permit application for a new structure.

Discussions with various municipal business units (i.e., Wastewater, Drainage and Waterworks, and Roads) were also held to determine the status of major utility upgrades and road improvements throughout the industrial areas.

Map 1: Industrial Areas



Vacant Land Inventory and Definitions

Summary totals of all vacant industrial land are provided in Table 1.

Table 1: Total Vacant Industrial Land Supply (hectares)

Industrial Area	Vacant Industrial Land Inventory
North/Northeast	2,083
Southeast	1,431
Central	15
Northwest	274*
Total	**3,804**

* Gravel extraction lands removed from long term supply (713 hectares) in Northwest Industrial Area

NOTES:

*For the purposes of this report, ***vacant land*** includes:

- subdivided land that has not been developed - i.e., tentative plan lots that have not, to January 1, 2005, had a building permit application for a new structure. Once a building permit application is received, the lot is removed from the inventory; and/or,
- vacant unsubdivided land that has land use in place - i.e., all vacant lands with an industrial designation. (All non-industrial land uses are removed from the inventory at the land use/outline plan stage); and/or,
- vacant unsubdivided land that is not designated but which has a policy plan in place; and/or,
- vacant reserve lands within generally defined industrial growth corridors (i.e., lands which are **not** within residential growth corridors).

Serviced Land Supply (Maps 2 to 5)

The extent of vacant lands that are either developed, fully serviced (with storm, sewer, water), partially serviced (requiring one or more major services), or unserviced is provided in the Serviced Land Supply maps. Fully serviced land is defined as land that does not require any additional City extensions to the three major utilities or any additional utility servicing studies and/or servicing agreements. ***However, private service connections to individual properties are still required.*** Partially serviced lands include areas that are lacking one of the major underground services (storm, sanitary, or water). Partially serviced lands may also include lands that are technically fully serviced, but which require additional storm/water/sanitary servicing studies. Partially serviced lands are also described as 'potentially serviceable in the short term' in the following maps. Lands that currently have no major services in place are largely described as 'vacant long term growth areas.'

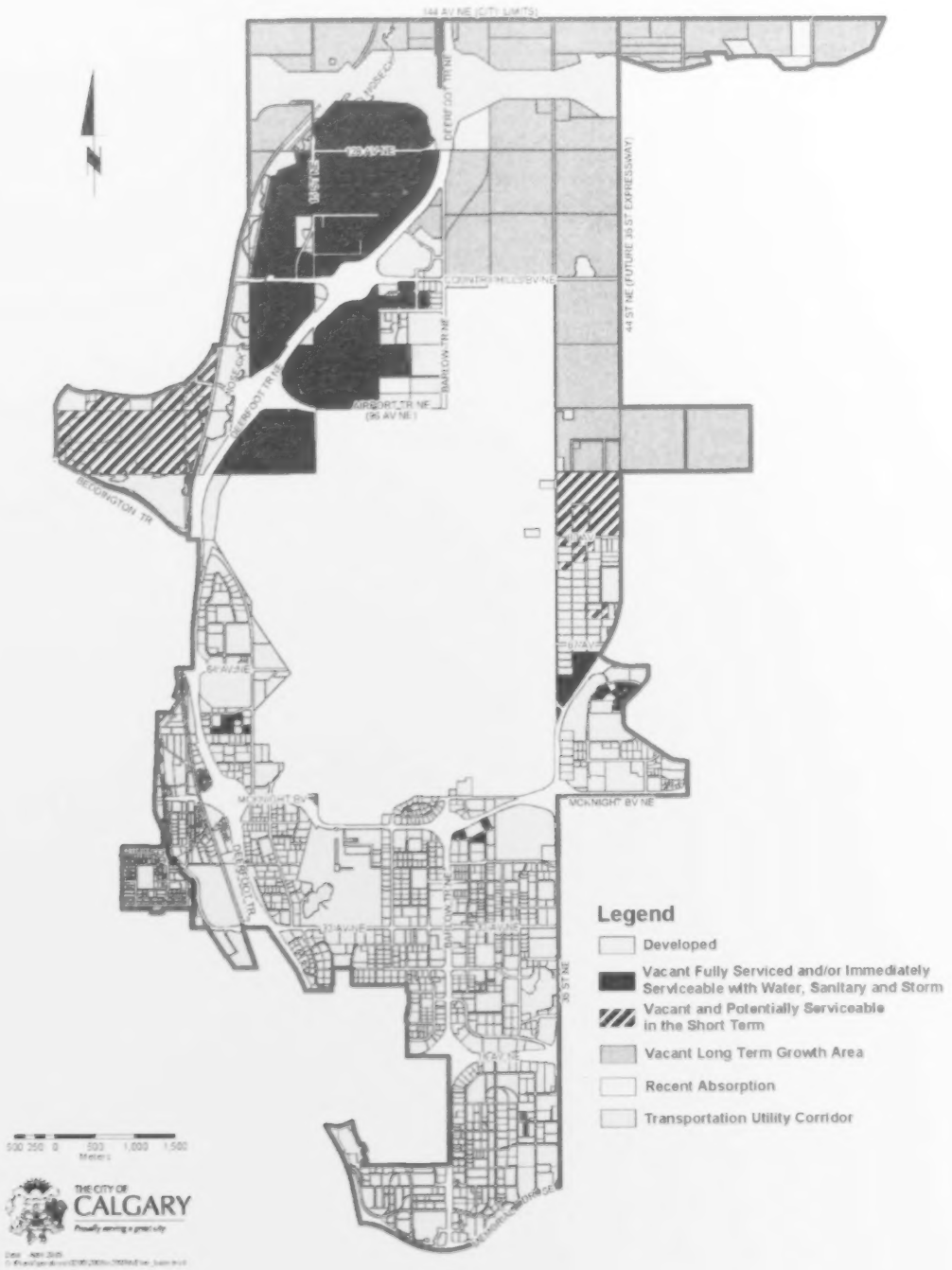
Serviced land supply is illustrated on Maps 2 to 5. Summary area information by serviced land category is presented in Table 2.

Discussion of Serviced Supply

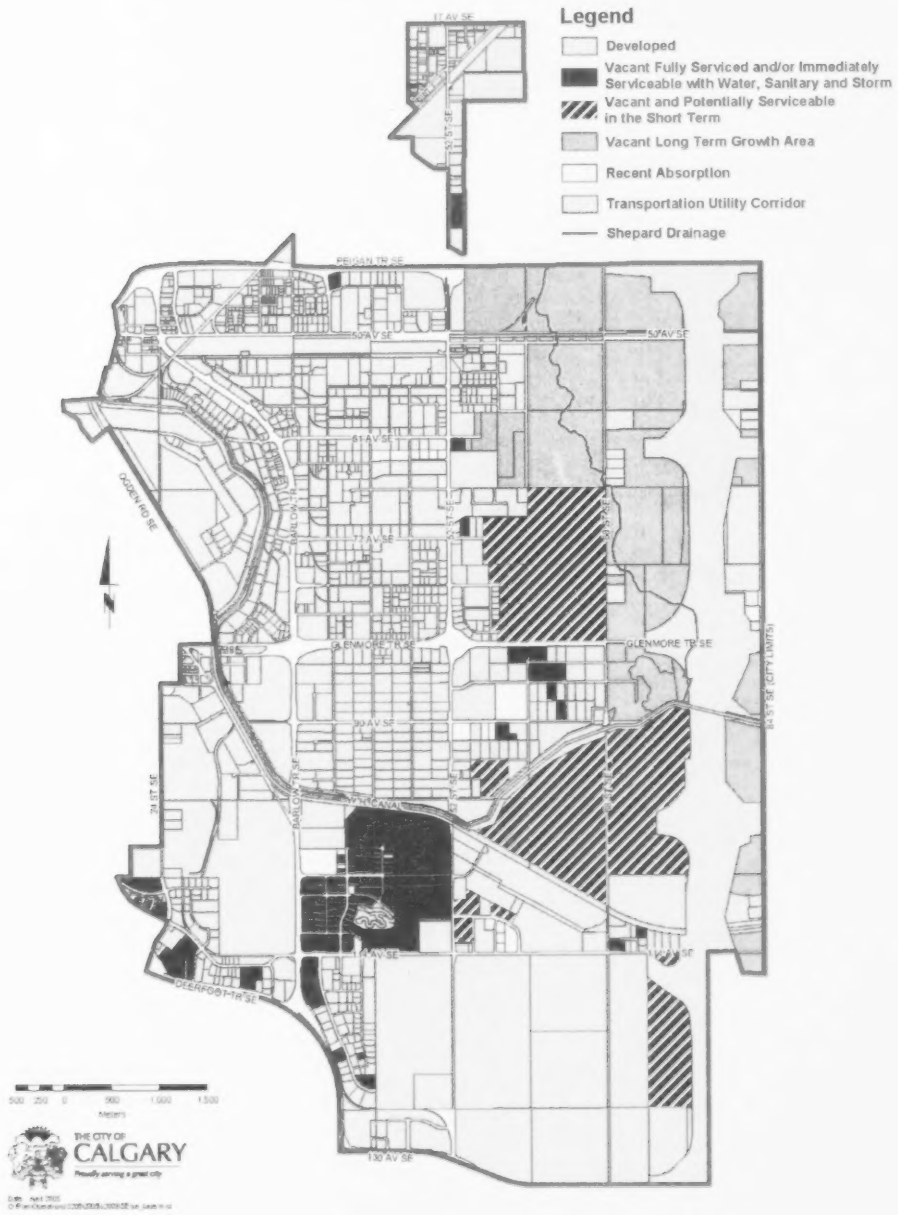
Industrial lands account for 17% of the gross land area within the city limits: 12,029 hectares (29,723 acres), or approximately 47 sections. Of this total, approximately 68% or 8,2256 hectares (20,323 acres) are developed.

The total inventory of developable industrial lands is 3,804 hectares (9,399 acres). Land with all required services in place totals 983 hectares (2,429 acres). Lands lacking one or two major municipal services total 763 hectares (1,885 acres); see Table 2. Lands without any major services in place total 2,057 hectares (5,083 acres). The distribution of land by supply categories and by industrial area is provided in Table 2.

Map 2: North/Northeast Industrial Area Serviced Land Supply

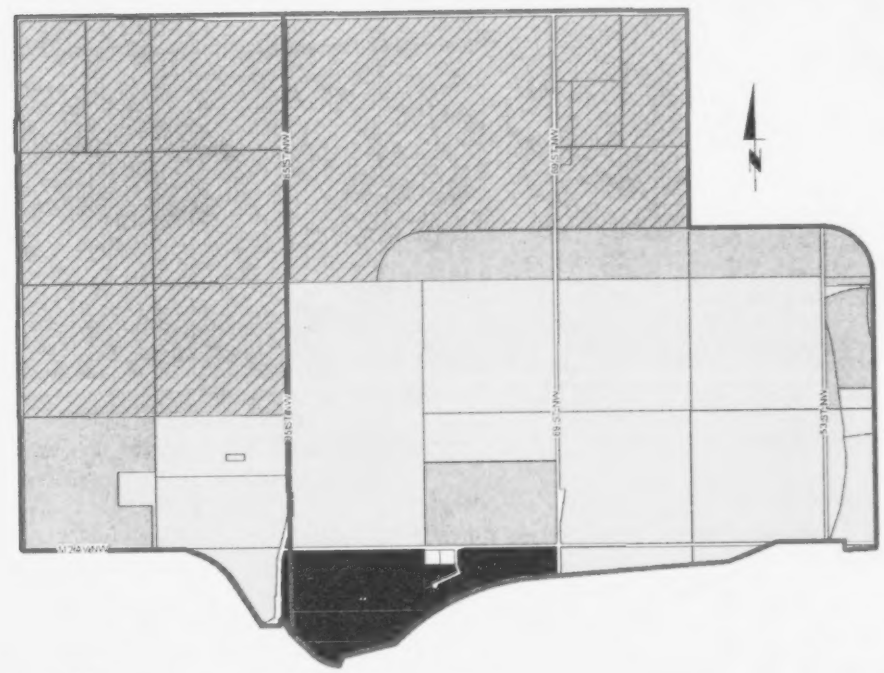


Map 3: Southeast Industrial Area Serviced Land Supply



Map 4: Central Industrial Area Serviced Land Supply

Map 5: Northwest Industrial Area Serviced Land Supply



Legend

- Developed
- Vacant Fully Serviced and/or Immediately Serviceable with Water, Sanitary and Storm
- Vacant Long Term Growth Area
- Vacant – Gravel Operation
- Recent Absorption

500 250 0 500 1,000
Meters

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Table 2: Summary of Land Area by Supply Category and Industrial Area (hectares)

Industrial Area	Developed / Unavailable	Immediate Land Supply	Short Term Land Supply	Long Term Land Supply	Total
North/Northeast	2,384	663	248	1,172	**4,467**
Southeast	3,798	237	516	679	**5,229**
Central	1,443	15	0	0	**1,459**
Northwest	600	68	0	206	**874***
Total	**8,225**	**983**	**763**	**2,057**	**12,029**

* Gravel extraction lands removed from long term supply (713 hectares) in Northwest Industrial Area

Table 3 indicates the changes in land supply over the last year.

Table 3: Change in Land Supply: 2004 (hectares)

Industrial Area	Change in Immediate Land Supply	Change in Short Term Land Supply	Change in Long Term Land Supply
North/Northeast	380	-392	-1
Southeast	-49	-25	-3
Central	-17	0	0
Northwest	-3	0	0
Total	**312**	**-418**	**-4**

The major changes in industrial land supply over the last two years are:

- **71 hectares (175 acres)** of immediate industrial land supply were 'taken up' or absorbed over the past year (table 1). This includes all land absorbed for industrial uses, storm pond areas, non-industrial uses (i.e., commercial, institutional, and/or recreational), reserve lands, and other non-industrial lands (environmental reserve and road rights of way).
- The only absorption of serviced land capacity that has taken place in the northeast, is north of Airport Trail N.E., for a storm pond facility and activity in the Westwinds Business Park.
- The 53 hectares (133 acres) of absorption of land in the southeast occurred in the Eastlake Industrial Park developed by Corporate Properties, on a new warehouse project developed by Bentall north of 64 Avenue S.E. and in various other parcels scattered throughout the region.
- Smaller industrial (DC-I2) parcels were subdivided in 2004 and building permits approved in the Spyhill Business Park located in the Northwest Industrial Area.

- In the Central Industrial Area a total of 7 hectares of vacant land were absorbed (including an auto dealership and other commercial development).
- Immediate supply increased by 312 ha (771 acres) as a result of the approval of the *Revised Stoney Area Structure Plan* in the Northeast. Correspondingly, short term land supply decreased by a total of 418 ha (1,033 acres) and long term supply diminished by 4 ha (10 acres).

Table 4 illustrates the distribution of serviced vacant land by parcel size and by industrial area. A range of parcel sizes are required to accommodate the broad range of potential industrial uses allowed within all industrial areas.

Table 4: Number of Vacant Serviced Parcels by Parcel Size and Industrial Area (hectares)

Industrial Area	Less Than 1 Hectare	1 to 4 Hectares	4 to 16 Hectares	16 to 32 Hectares	Greater than 32 Hectares
North/Northeast	41	24	7	7	7
Southeast	62	43	4	0	2
Central	2	3	1	0	0
Northwest	10	3	3	1	0
Total	**115**	**73**	**15**	**8**	**9**

PLANNED LAND SUPPLY AND POLICY CONTEXT (MAPS 6 TO 9)

In addition to basic information on land servicing, this report categorizes serviced and unserviced land supply by stage in the 'planning pipeline.' The planning pipeline includes the following categories:

- Urban Reserve Lands - lands annexed to the city, and held for municipal purposes, but not yet redesignated to a specific active land use. Urban reserve land may or may not have additional policy plans describing their intended future land use. A 30 year supply of land is required within the municipal boundary for all urban reserve lands, policy planned land and other vacant serviced/serviceable lands.
- Policy Planned Land - lands that have been included in a policy planning study, including an Area Structure Plan (ASP), Area Redevelopment Plan (ARP), design brief or other policy plan. These plans describe the future intended general land use of an area, including proposed future road and municipal infrastructure, and related public amenities (e.g. school sites, environmental reserve, proposed recreational facilities). Council requires 15 years of policy planned land within the municipal boundary.
- Subdivided Land with Land Use – lands that have a completed Outline Plan and corresponding land use amendment redesignating the land to a specific land use district. These lands are also generally serviced or serviceable (roads, storm, sanitary, and water). At this stage in the planning process the road network, lotting plan, land use, and general urban design character of a community are defined and prescribed in the actual land use district bylaws. General practice (based on residential land development requirements) has resulted in The City endeavoring to plan and service a five year supply of industrial land.
- Development Approvals – once an outline plan is registered and land use is approved, applications for development and building permits and other requirements will be accepted by the Approving Authority.

Figure 1 illustrates the planning pipeline for industrial land.

Figure 1: THE PLANNING & DEVELOPMENT PIPELINE

Simplified Relationship Between Planned Land Supply,
Serviced Land and Land Supply Categories

Policy Status	**Urban Reserve** (and/or AG) "No Policy Plan in Place" ➡	**Policy Plans** (ASPs, Design Briefs) ➡	**Land Use** Outline Plan ➡	**Subdivision** Tentative Plan ➡	**Development Approvals** DPs, BPs, etc.
Servicing Status	**Not Serviced**	**Partially Serviced** • private agreement may bring services sooner • unserviced industrial land applications possible.	**Serviced or Immediately Serviceable** • no additional city services required • private servicing 'extensions" to development sites is required		
ISTGMS Land Supply Category	**'Long Term'**	**'Short Term'**	**'Immediate'**		
Tabulated Land Supply Data	**RAW Land**	**Gross Land**	**Net Developable** *non-industrial LU removed from inventory*	**Net Vacant Land** *lots removed from inventory*	
Policy Mandate	**30 Year supply MDP (1-18)**	**15 Year Supply Industrial policy**	**5 Year Supply Operational principle**		
Approximate Time to Construction	**5 to 30 Years**	**2 to 5 Years**	**6 months to 1 Year**		

The City, in collaboration with private industry, is charged with maintaining sufficient long-term residential ***and*** industrial land at three planning stages (see Table 5 below):

- a total land supply of 30 years (i.e., all vacant subdivided, policy planned and reserve land designated 'UR: Urban Reserve' or 'AG: Agricultural') land;
- a 15 year supply of policy planned land (including land with subdivision and land use in place); and,
- a 5 year supply of subdivided land with major servicing in place.

I-4 Limited Serviced Industrial development does not require the systematic development process as outlined above. Applications for land use redesignation and subdivision can be approved earlier in the 'planning pipeline' and clearly, without the same servicing constraints and servicing provisions required for serviced industrial development. In addition, I-4 industrial uses are identified as 'interim' uses, with the expectation that the all I-4 areas will transition to a fully serviced I-2 standard.

Table 5: Summary of Land Supply by Planning Category and Industrial Area (hectares)

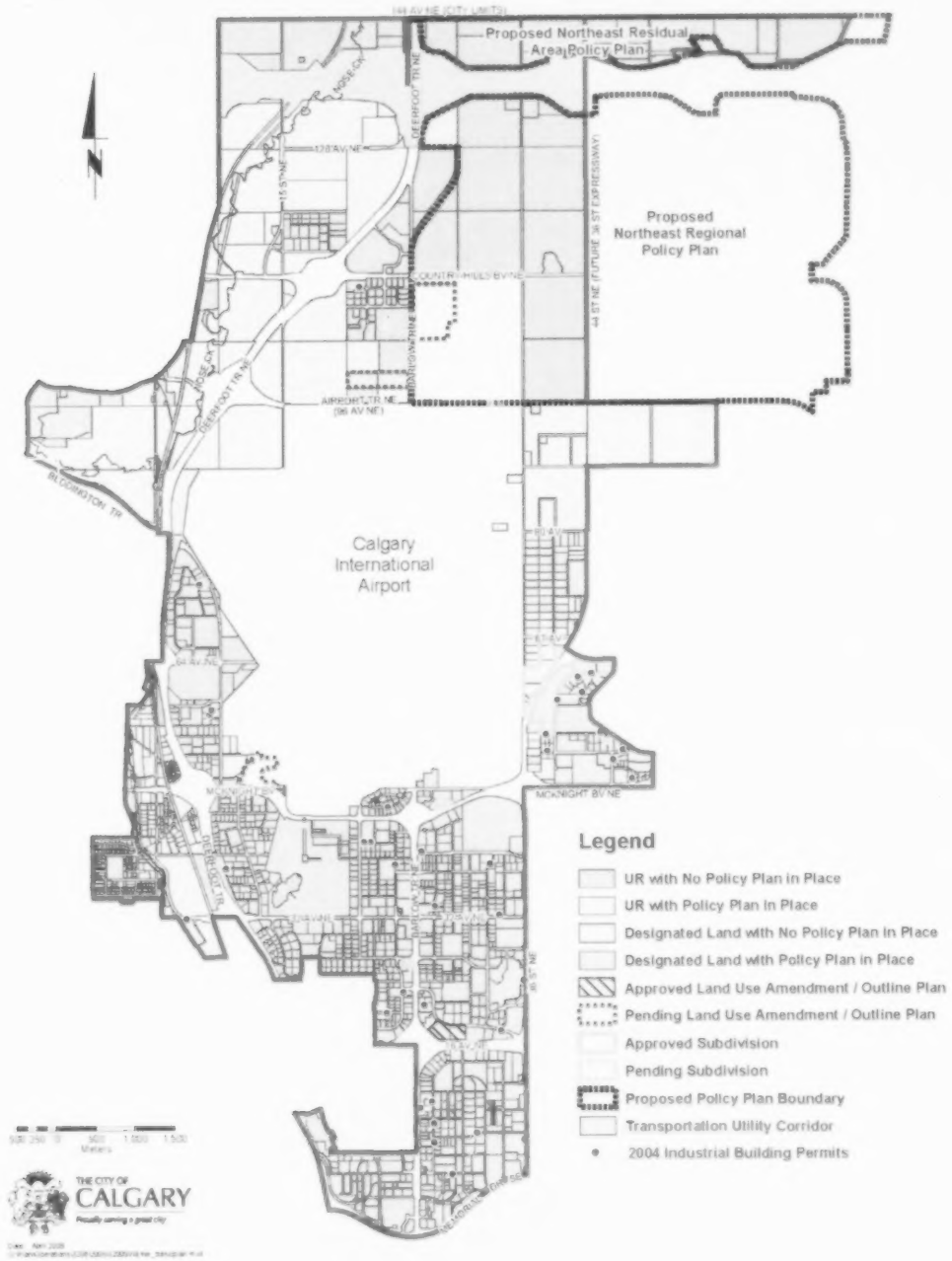
	Vacant Land Supply*		2004-2005 Development**
Industrial Area	Planning Category	Land Supply (Hectares)*	Building Permits ($)
North/Northeast	Reserve Lands (No Policy in Place)	923	$0
	Designated Lands (No Policy in Place)	0	$25
	Policy Planned Lands	1160	$38,567,221
	Area Total	**2083**	**$38,567,246**
Southeast	Reserve Lands (No Policy in Place)	0	$0
	Designated Lands (No Policy in Place)	0	$0
	Policy Planned Lands	1431	$93,413,054
	Area Total	**1431**	**$93,413,054**
Central	Reserve Lands (No Policy in Place)	0	$0
	Designated Lands (No Policy in Place)	15	$56,904,499
	Policy Planned Lands	0	$828,950
	Area Total	**15**	**$57,733,449**
Northwest	Reserve Lands (No Policy in Place)	100	$2,000
	Designated Lands (No Policy in Place)	115	$5,072,562
	Policy Planned Lands	59	$1,075,000
	Area Total	**274*** **	**$6,149,562**
City Total		**3804**	**$195,863,311**

*Vacant Land Only

**Includes Vacant And Developed Land

***Gravel extraction lands removed from land supply (713 hectares)

Map 6: North/Northeast Industrial Area Planned Land Supply


Proposed Northeast Residual Area Policy Plan
Proposed Northeast Regional Policy Plan
Calgary International Airport
Legend
UR with No Policy Plan in Place
UR with Policy Plan in Place
Designated Land with No Policy Plan in Place
Designated Land with Policy Plan in Place
Approved Land Use Amendment / Outline Plan
Pending Land Use Amendment / Outline Plan
Approved Subdivision
Pending Subdivision
Proposed Policy Plan Boundary
Transportation Utility Corridor
2004 Industrial Building Permits
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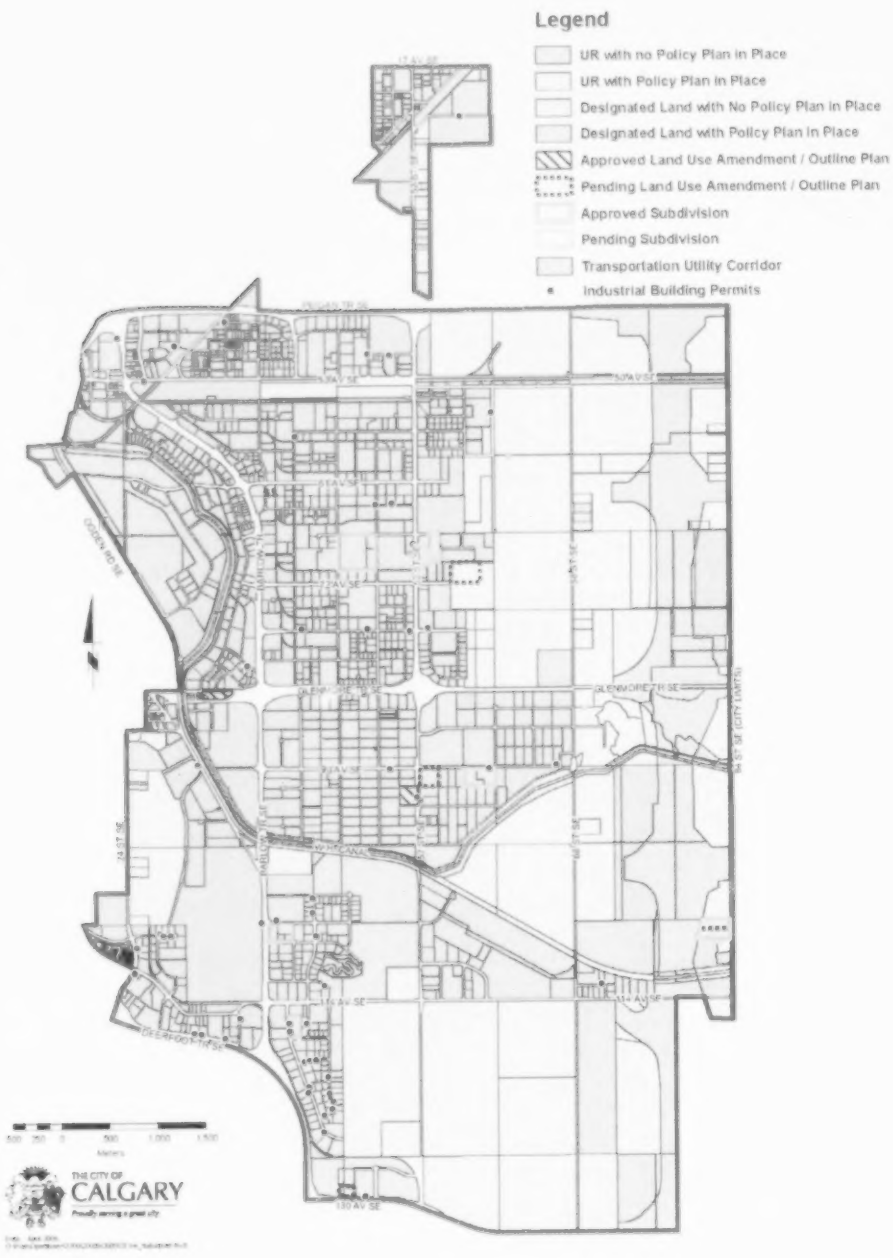
Map 7: Southeast Industrial Area Planned Land Supply


Legend
UR with no Policy Plan in Place
UR with Policy Plan in Place
Designated Land with No Policy Plan in Place
Designated Land with Policy Plan in Place
Approved Land Use Amendment / Outline Plan
Pending Land Use Amendment / Outline Plan
Approved Subdivision
Pending Subdivision
Transportation Utility Corridor
Industrial Building Permits
THE CITY OF CALGARY

Map 8: Central Industrial Area Planned Land Supply

Legend
UR with no Policy Plan in Place
UR with Policy Plan in Place
Designated Land with Policy Plan in Place
Designated Land with No Policy Plan in Place
Approved Land Use Amendment / Outline Plan
Pending Land Use Amendment / Outline Plan
Approved Subdivision
Pending Subdivision
2004 Industrial Building Permits
Meters
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Map 9: Northwest Industrial Area Planned Land Supply

Legend
UR with no Policy Plan in Place
UR with Policy Plan in Place
Designated Land with No Policy Plan in Place
Designated Land with Policy Plan in Place
Approved Land Use Amendment / Outline Plan
Pending Land Use Amendment / Outline Plan
Approved Subdivision
Pending Subdivision
Transportation Utility Corridor
Industrial Building Permits
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Land Supply for I-2 (General Light Industrial), I-3 Heavy Industrial and I-4 Limited Service Industrial Uses in the Southeast Industrial Area

Map 10 and Table 6 illustrate the location and extent of land available for serviced 'I-2 General Light Industrial', 'I-3 Heavy Industrial' uses and 'I-4 Limited Service Industrial' development.

The reclassification of lands resulting from the Eastlake Industrial Park and subdivision, eliminated all future I-3 Heavy Industrial lands in the Southeast Industrial Area, and, in fact, citywide. Current difficulties in locating heavy industrial activity outside of its traditional core area in the Southeast Industrial Area (e.g. the Ranchers Beef facility), and the lack of suitable policy planned lands for this activity (either in the Municipal Development Plan or related industrial Area Structure Plans) highlight an important land use planning policy gap that currently exists. In addition, a potential oversupply of I-4 Limited Service Industrial land also may exist, if all lands identified in the 1996 'Southeast Industrial Area Structure Plan' as 'Industrial/Limited Service Industrial' are available for I-4 development. Eliminating this oversupply of future I-4 lands is required to focus future I-4 industrial development in areas that will not compromise fully serviced industrial development. With new I-4 development proceeding in the M.D. of Rockyview east of 84 Street S.E., there is the opportunity to remove the need for all limited service industrial development within Calgary.

Map 10: Southeast Industrial Area I-2, I-3 and I-4 Land Supply

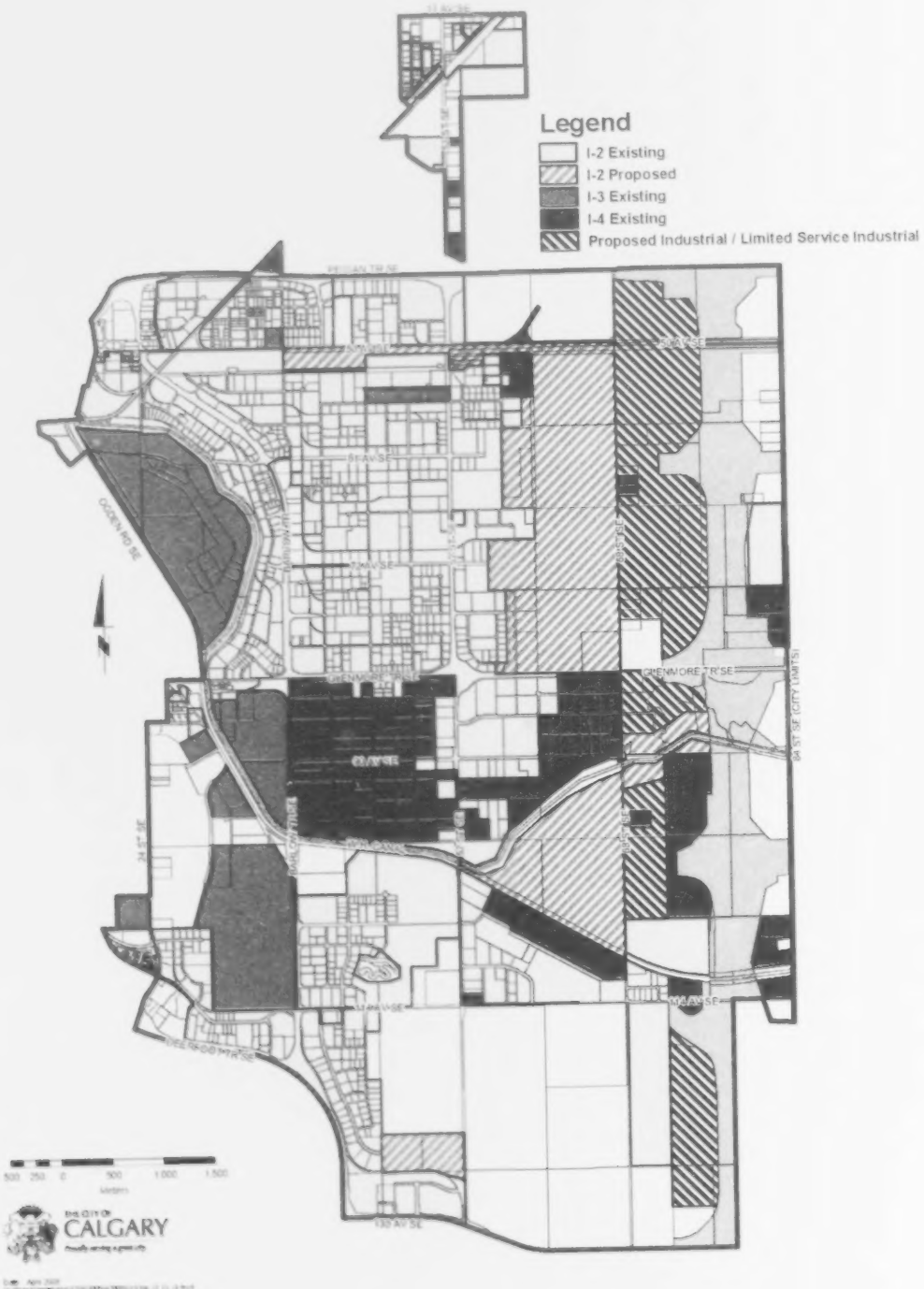


Table 6: Developed and Vacant Land Supply by Land Use Designation in the Southeast Industrial Area

(hectares)

Developed Area					Vacant Area					Total Southeast Industrial Area
I-2	I-3	I-4	Other	UR	I-2	I-3	I-4	Other	UR	
1,207	386	210	652	1,343	226	0	16	118	1,071	5,229

LAND DEMAND

Previous Demand Estimates

The *Calgary Industrial Land Requirements, 1997 – 2046* consulting report prepared by Brown and Associates provided a forecast of industrial land demand by major industrial sector for the original *ISTGMS* prepared in 2000. Total annual demand was estimated at 97 hectares (240 acres) per year, excluding commercial development. Commercial activity (office and retail development) is estimated to add 24 hectares (60 acres) per year to industrial land demand. Twenty-five percent of all industrial lands are used for commercial purposes and of that, 16 to 20 hectares or 40 to 50 acres per year are absorbed for retail uses. Suburban office development is estimated to require 4 to 6 hectares (10 to 15 acres) per year. Average annual land demand, including commercial uses is, therefore, estimated at between 117 to 123 hectares (290 and 305 acres) per year. In 2003 absorption was significantly higher than this average (at 165 ha) while in 2004 absorption was lower than this average estimate (at 71 ha). Over the past two years, absorption has averaged 118 hectares (291 acres) in keeping with the long term average used for forecasting purposes.

Land Demand Update

Comparing the land supply totals from the previous industrial report with the totals determined in 2004 provides an estimate of city-wide absorption of industrial land. The year's absorption (2004) of land by industrial area is provided in Table 7.

Table 7: Land Absorption: 2004 (hectares)

Industrial Area	Land Absorbed
North/Northeast	9
Southeast	53
Central	7
Northwest	2
Total	71

A total of 71 hectares (175 acres) of land have been absorbed by industrial activity since the previous report. The area of major absorption over the forecast period was the Southeast Industrial Area, at 53 hectares (131 acres) of land absorbed. The Northeast Industrial Area had absorption of 9 hectares (22 acres). A total of 7 hectares of land was absorbed in the Central industrial area. A total of 2 hectares were absorbed in the Spyhill Business Park lands in the Northwest Industrial Area.

This level of absorption is lower than average forecast absorption (120 ha; 300 acres); and significantly lower than the previous years absorption (165 ha; 408 acres). However, over the past two years average absorption has approximated the long term average at 118 hectares. With the opening of the Stoney Industrial Area to development and the opening of new phases in the Eastlake Industrial Area over the remainder of 2005, the absorption of industrial land for 2005 should be significantly higher than was seen during 2004.

Table 8 indicates years of remaining land supply by supply category, based on average demand estimates.

Table 8: Estimated Years of Serviced Land Supply by Category (hectares)

	Immediate Land Supply	Short Term Land Supply	Long Term Land Supply	Total
Total Supply	983	763	2,057	3,804
Years of Supply Remaining *	8.2	6.4	17.1	31.7

* Based on the estimated absorption rate of 120 hectares per year

Immediate supply totals 985 hectares (2,434 acres), or 8.2 years of supply at the forecast absorption rate of 120 hectares (300 acres) per year. This total suggests that a sufficient supply of developable land is currently available. However, further planning and development work (i.e. outline plans, development permits, etc., and private service extensions) is required on the majority of these lands prior to construction. Current land supply constraints will be alleviated only after these planning and private infrastructure requirements are met. A further 6.4 years of supply (763 hectares or 1,885 acres) are available on short-term (lands with one or two services in place).

Significant tracts of land are available in long term supply (2,057 hectares or 5,083 acres). The removal of land areas anticipated for wetland areas abutting Forest Lawn Creek may lower future industrial supply considerably.

Future short-term demand for industrial land will be met within the North/Northeast and the Southeast Industrial Areas. The Central Industrial Area is largely built out except for 15 hectares (37 acres) scattered throughout the area and new industrial lands available in the Deerfoot Meadows area.

The development of the EastLake Industrial Park in the southeast has provided the largest tracts of industrial land for industrial developers and end users. Phase I of the Eastlake development has been completely sold out. Approximately 200 acres of industrial serviced land have been acquired, largely by industrial development companies for build to suit/lease industrial product. Corporate Properties anticipates that Phase II of the Eastlake development will be available in late 2005 or early 2006. As anticipated in last years report, Eastlake development has been heavily subscribed by the Calgary industrial development and end user community, resulting in diminished demand for land in the Northeast Industrial Area. With Phase I of Eastlake completely sold, and no further supply available until late 2005 or early 2006, industrial users will again be looking for suitable land in the northeast, or delaying land acquisition until phase II of the Eastlake project is brought to the market. As well, approval of the *Revised Stoney Industrial Area Structure Plan* has been obtained, resulting in new industrial land supply becoming available. Despite longer term transportation constraints, the new Stoney industrial inventory should result in increased industrial absorption in the North/Northeast area to long term average estimates of 30 to 40 hectares per year. Based on this information, Table 9 provides a short-term forecast of industrial land demand.

Table 9: Forecast Absorption of Serviced and Planned Land by Industrial Area

Industrial Area	Forecast Land Absorption 2005-2009
North/Northeast Total Absorption @ 30 to 40 hectares per year	150 - 200 ha
Southeast Total Absorption @ 60 to 70 hectares per year	300 - 350 ha
Central Total Absorption @10 hectares per year	28 ha
Northwest Total Absorption @1 to 2 hectares per year	5 - 10 ha
	~ 480 - 590 ha

Based on the rapid absorption of industrial land in the Southeast Industrial Area, and the short-term absorption of remaining lands in the Central Industrial Area, land absorption city-wide was predicted **in last year's report** to remain below the expected 120 hectares (300 acres) per year level until new industrial properties in the Southeast Industrial Area were brought to market. City-wide land absorption was predicted to total 91 to 111 hectares (225 to 275 acres) per year. In fact, in 2004, land absorption was significantly lower at 70 hectares. Absorption of land is expected to increase in 2005, with the development of Eastlake phase I and the opening of lands in phase II.

In 2004, land absorption in the North/Northeast Industrial Area was below the forecast of between 30 and 40 hectares (75 to 99 acres) at 9 hectares (22 acres). With approval of the *Revised Stoney Industrial Area Structure Plan,* this trend should be reversed by mid to late 2006. Land absorption in the Southeast Industrial Area is forecast to remain high at 60 to 90 hectares. New development in the Central and Northwest is expected to be limited (5 to 10 hectares) over the coming year.

Land Supply and Absorption Estimates

Tables 3 to 6 presented an overview of city-wide industrial land supply and absorption. Immediate serviced land supply city-wide provides for an expected 8.2 years of absorption. The completion of land sales in Eastlake Phase I has resulted in limited inventories of available serviced land supply in the southeast. Supply constraints in the southeast may prompt increased industrial takeup of land available elsewhere, or redevelopment of existing older industrial sites. A more significant short term market continues to be the development of self-serviced DC(I-2/I-4) sites. A number of applications for this type of development have been received within the City's

jurisdiction, as well as east of 84 Street S.E. in the Municipal District of Rockyview. Ongoing negotiations and potential delays in finalizing the Shepard Constructed Wetland Project, and further negotiations for lands required for wetland areas, environmental reserve and pathways along Forest Lawn Creek, could prompt even more industrial developers to acquire unserviced Urban Reserve lands for large scale limited service development.

Synopsis of Industrial Development Activity

The lower rate of absorption of industrial land in 2004, indicates the impact of land supply constraints. Significant inventories of serviced land are available city-wide, in the two major policy categories: serviced land supply and planned land supply. However additional planning and private infrastructure work is required to bring the bulk of this available land to market. These constraints will continue to be experienced in the Southeast Industrial Area until completion of planning work for phase II of Eastlake in the later part of 2005 (possibly as early as August). No new major industrial land developments are anticipated in the short-term. Great Plains Industrial development is planned for late 2007/2008, and is largely dependant on the status of the Shepard Constructed Wetlands project. The wetlands project is proceeding with some pre-work (e.g. fencing and utility relocations). Additional lands within the City and in the Region remain to be acquired. Estimated project completion remains early to mid 2007. Parks related development along the 'Forest Lawn Creek' and related pathways could result in significant loss of future industrial land capacity on the lands east of 52 Street. Negotiations between Parks and Corporate Properties are continuing, with some estimates for park requirements ranging between 300 to 500 acres for the existing creek and planned linear park system.

The acquisition by Chicago based industrial developer Vertus of 3 industrial sites and proposed development of 650,000 sf of warehouse product marks the first wave of US based developers into Calgary's' industrial market. Calgary's continued economic growth is likely to attract additional interest from other international development companies. Other major new projects over the past year include Bentalls 'Building 5' north of 64 Avenue in the southeast (a total of 450,000 sf in 5 buildings), and Tonkos 'Portico Building' on 106 Avenue in the Eastlake Industrial Park (115,000 sf). Hopewell is completing a 310,000 sf project. According to CB Richard Ellis, a further 1,000,000 sf of additional industrial projects have been announced (CBRE, Marketview: Calgary Industrial, 1st Quarter 2005, pg1).

Ongoing supply constraints, increased industrial serviced land costs, and other factors are contributing to the development of extensive unserviced industrial areas immediately outside the city boundary (84 Street S.E.). Over the past year Remington has sold 106 acres of unserviced industrial land to a variety of industrial users in their 'Transport Industrial Park'. Kleysen has a further 80 acres of land in a limited service industrial park. Pattison is also developing limited service industrial land in the area. A

significant belt of unserviced industrial land now exists from the eastern edge of the Transportation Utility Corridor into the M.D. of Rockyview.

North of the city, within areas regulated by the *East Balzac Area Structure Plan*, additional lands are slated for limited service industrial development. 'Wagon Wheel Industrial Park' has approximately 100 acres of land available for development on sites east of highway 2, south of the Balzac interchange. The 'Genesis Business Park' contains a further 150 acres of limited service industrial and commercial land capacity on lands abutting highway 2. Additional industrial development is anticipated on M.D. of Rockyview lands adjacent to the Nexen Gas Plant just north of the city limits. In order to service the proposed Ranchers Beef abattoir, and other industrial areas, a regional wastewater sewer main is being proposed. The main will travel along road rights-of-way to Langdon to an expanded treatment facility. The construction of this wastewater servicing main will lead to increased development activity on lands adjacent to the proposed sewer right-of-way.

Servicing of the Northwest Industrial Area is limited to the 'Spyhill Business Park' area (south of 112 Avenue N.W.). A total of 50 gross hectares of developable land are available in the area, but stormwater must be accommodated on site and will limit development intensity. Pacific Investments is developing a limited service industrial area at 76 Street and 112 Avenue N.W., immediately east of the city-owned Spyhill Business Park lands.

In the Northeast Industrial Area, completion of the *Revised Stoney Industrial Area Structure Plan* has opened up a significant portion of the area for fully serviced industrial development. However, further planning work is required before new lands will be available for development (i.e., outline plans/land use). Planning for the Aurora Business Park, just south and west of the Stoney lands, is ongoing. Corporate Properties has contracted a consulting firm to prepare an outline plan for the area.

In conclusion, this short survey of industrial land highlights the short term land supply constraints currently found in Calgary. During the remainder of 2005 and early 2006, development activity will be limited to leased land in the Eastlake Industrial Park, the Freeport Business Park, the Westwinds area, lands available at the Airport, two to three parcels in the Spyhill Business Park area and smaller vacant parcels in the remainder of the Southeast industrial area. There will also be increased incentive to find suitable serviced redevelopment sites in older industrial areas. Regional industrial development is also expected to accelerate.

APPENDICES

APPENDIX 1: CONTEXT OF THE INDUSTRIAL STRATEGY

The *Industrial Area Growth: Information Update is* one part of a larger initiative to monitor city-wide growth and coordinate capital investment.

The *Residential Suburban Growth: Information Update* has provided a coordinated response to the planned provision of residential infrastructure for over a decade. It also provides a mechanism to review growth expectations of the private development community.

Accommodating Growth: A Framework for Coordinating Municipal Capital Investment illustrates growth-related capital projects for all growth areas around the city. The three documents – *The Framework*, the *Residential*, and the *Industrial* growth reports– form the basis for tracking development, monitoring land supply and demand, and coordinating capital investment in Calgary.

The Calgary Plan provides the general policy context for all work in industrial areas, and states that efforts should be made to:

- Attract and retain suitable business and industry to Calgary by fostering economic diversification and providing a climate that supports and enhances economic activity. (2-3.1A)
- Endeavour to ensure the availability of competitively priced, easily serviceable and developable land for industrial purposes. (2-2.2.6A)
- Cooperate with industrial land owners and developers in order to:
  - make existing industrial areas more attractive to new businesses
  - provide high quality industrial areas in the future. (2-2.2.6B)
- Require industrial firms to make a positive contribution to the environment of the surrounding area, particularly where they occupy sites adjacent to residential development. (2-2.2.6C)
- Explore various means of financing utilities in industrial areas to reduce the initial capital outlay required by industry. (2-2.2.6D)
- Encourage the relocation, where appropriate, of low intensity, functionally obsolete or incompatible non-residential land uses in the built-up area to peripheral areas and encourage vacated sites to be developed for more appropriate uses. (2-2.2.6E)
- Monitor the need for serviced industrial land in a manner similar to the way in which residential land supply requirements are reviewed through the *Short Term Growth Management Strategy (RSTGMS)*. (2-2.2.6F)
- Protect appropriately located industrial development from undue encroachment of residential development in cases where the nature of the industrial activity requires separation from residential uses. (2-2.2.6G)

In addition to this policy framework, more specific industrial policies were approved by Council in 2000. These policies are listed below:

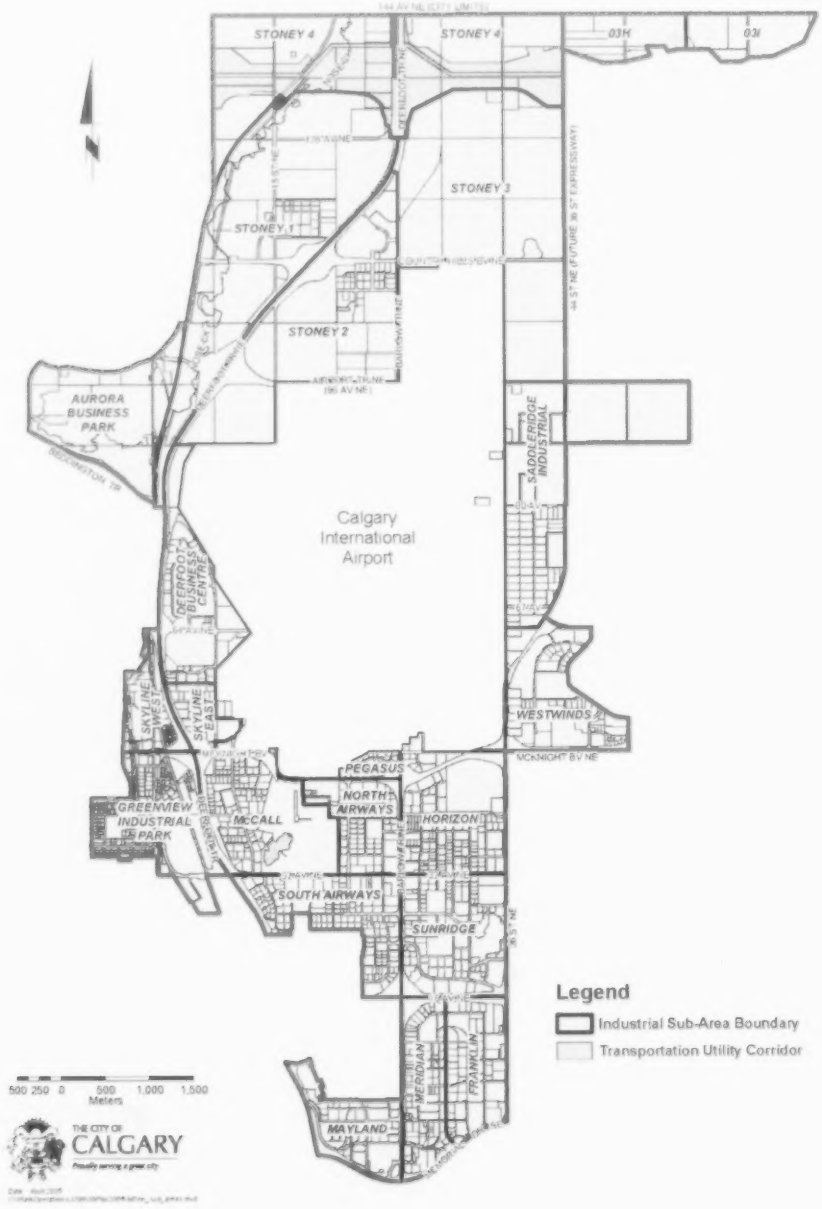
- The City of Calgary supports the provision of a full range of industrial uses suitable within an urban municipality. In this context, The City of Calgary should ensure that up to date area structure plans are in place sufficient to accommodate industrial growth demands in all industrial areas through the medium term (i.e. a 15-year supply).
- Review and amend existing area structure plans to reduce the amount of industrial land with policy support for limited serviced industrial uses, helping to better reflect the appropriate need for this form of industrial development within the city.
- Through future planning processes, explore the merits and opportunities for serviced high quality linear industrial development to locate along the city's existing and future expressways that may take advantage of the visibility and access these roads provide.
- The City of Calgary shall endeavour to maintain a supply of serviced industrial land and a variety of readily available parcels in a variety of sizes and locations, to meet the broad industrial market demand in the short-term.
- Consider the limited provision of non-industrial uses in industrial areas that support industrial development, but recognize the primacy of industrial uses. Re-examine the I-2 land use district to ensure the list of uses are appropriate within industrial areas.
- The City will monitor and analyse the supply of vacant fully serviced/serviceable industrial lands, vacant potentially serviceable industrial lands and vacant unserviceable industrial lands in the short-term in order to fully inform industrial planning and development decisions. The information base of this *Strategy* should be updated on an annual basis.
- To facilitate development, decisions on capital expenditures relating to the extension of Municipal Water, Sanitary and Storm and Transportation systems are made through the normal budgeting process. These decisions will be made strategically by considering:
  - That within the context of the overall capital budget, the relative importance of capital expenditures supporting growth in the industrial sector of the city's economy;
  - If identified, an assessment of growth priority areas resulting from the Strategy;
  - The capital cost implications of infrastructure extensions and improvements including The City's financial capability;
  - If identified and explored, alternative infrastructure funding options;
  - An understanding of industrial land supply and demand in all industrial areas of the city and surrounding region; and
  - The impact of the provision for shallow utilities and other services.

This report provides an overview of recent industrial development activity, detailed information on land supply, and estimates of future land demand. The report is the

next step forward in providing better technical information required for an improved understanding of the needs and requirements of the industrial land and business community in Calgary. It also provides the opportunity for the industrial development community to provide feedback to the Administration. Ongoing regular communication between the Administration and the industry on general industrial policies is one of the major benefits expected from the industrial land inventory reporting process.

APPENDIX 2: ADDITIONAL INDUSTRIAL AREA MAPS AND TABLES

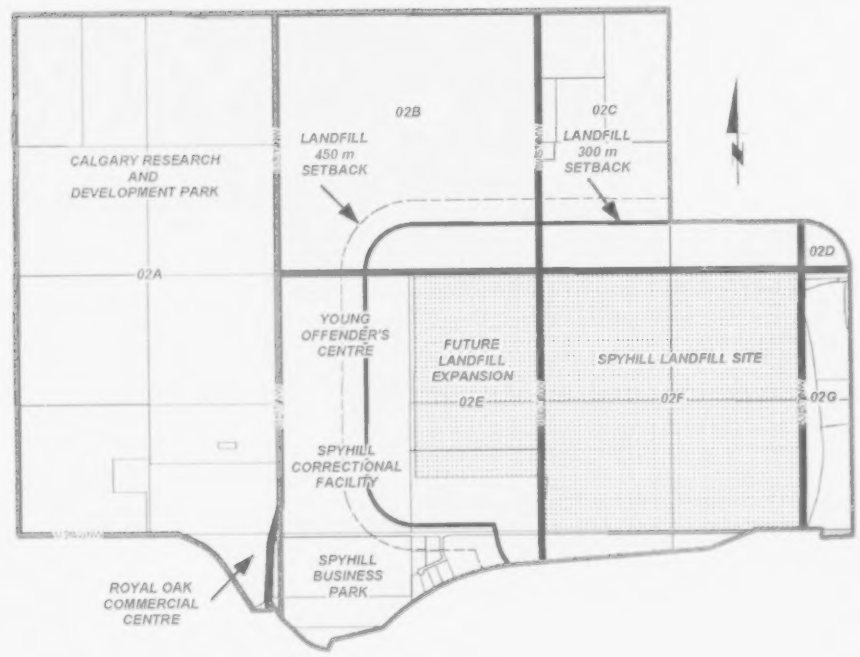
Map 11: North/Northeast Industrial Sub-Areas (April 2005)



Map 12: Southeast Industrial Sub-Areas (April 2005)

Map 13: Central Industrial Sub-Areas (April 2005)

Map 14: Northwest Industrial Sub-Areas (April 2005)

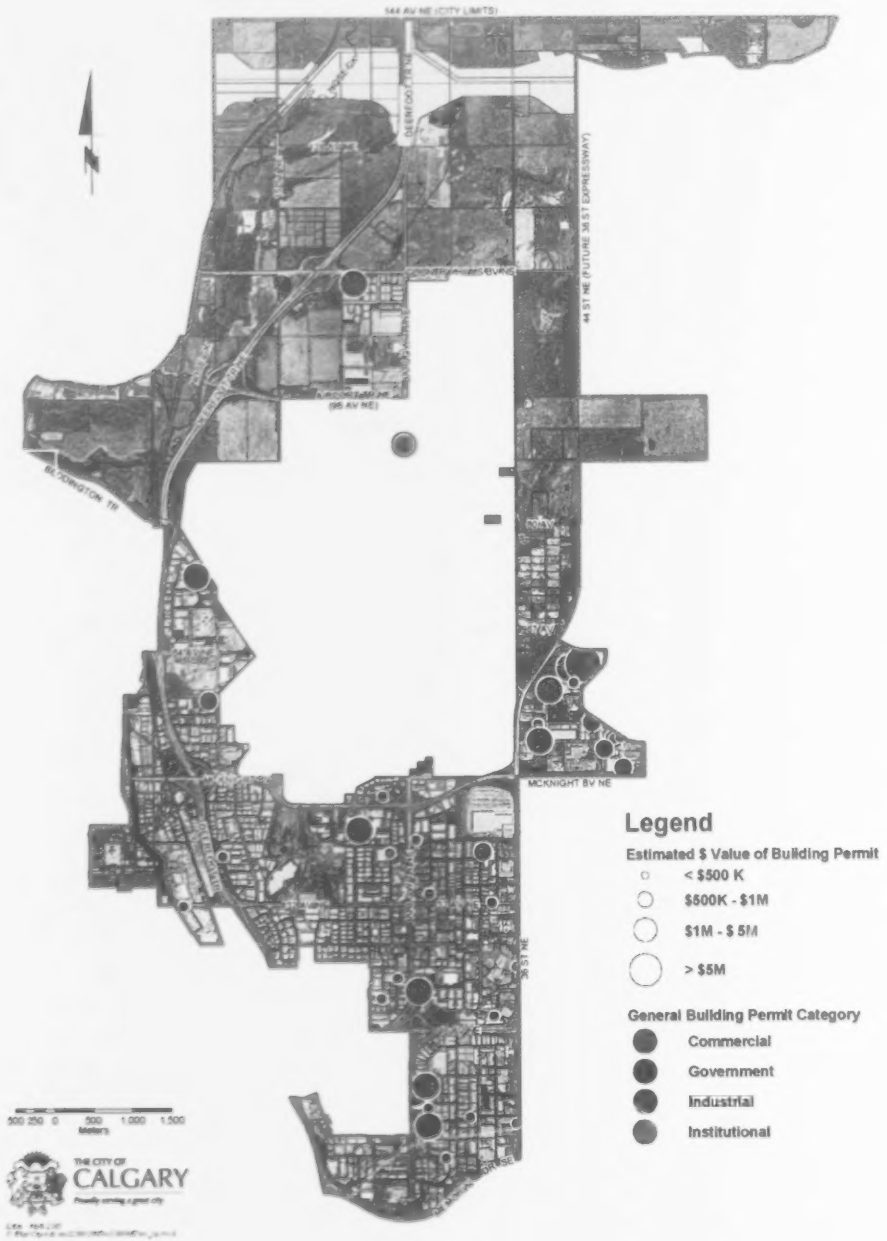


Legend

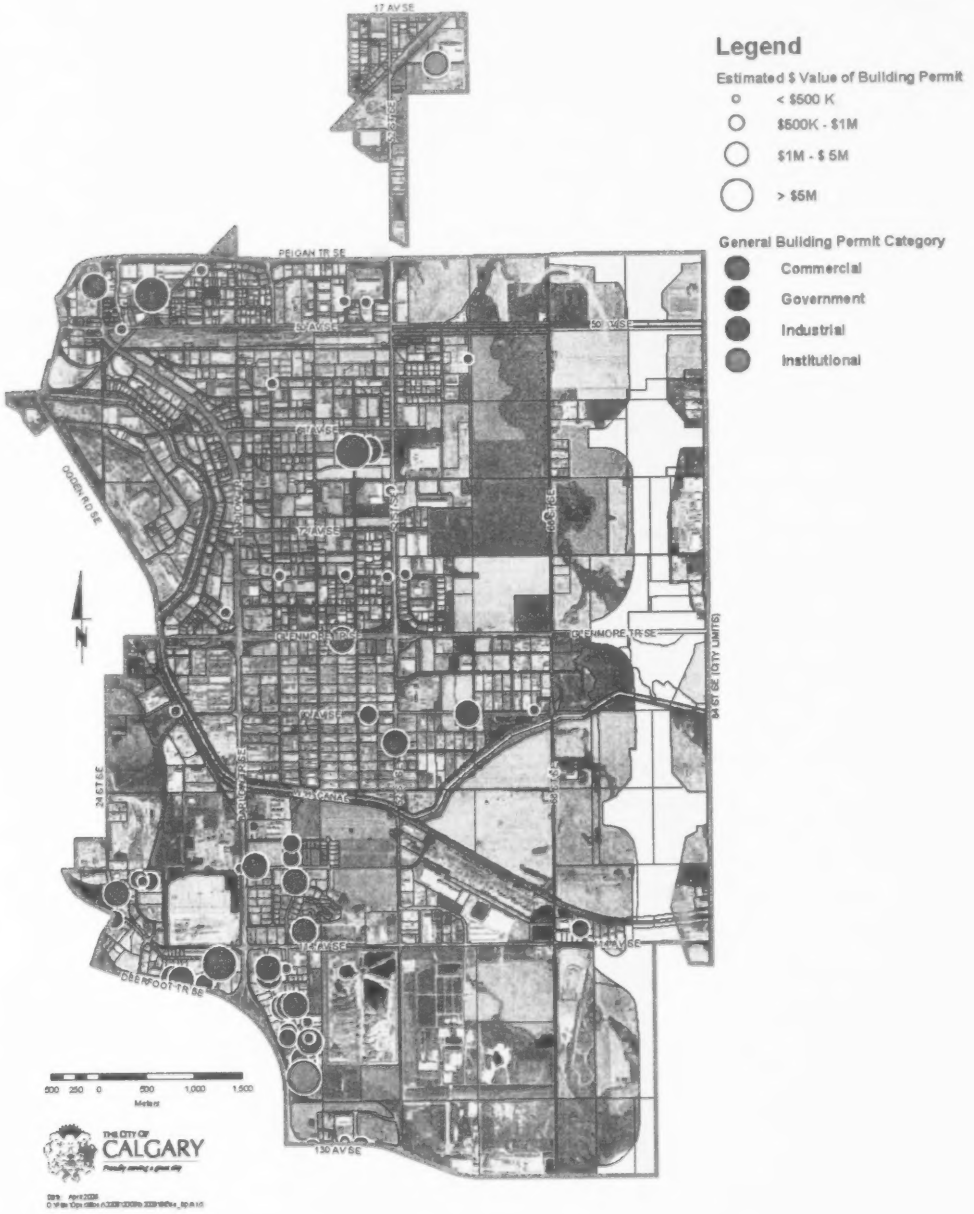
Industrial Sub-Area Boundary

THE CITY OF CALGARY

Map 15: North/Northeast Industrial Area Development Activity (2004)



Map 16: Southeast Industrial Area Development Activity (2004)



Map 17: Central Industrial Area Development Activity (2004)

Map 18: Northwest Industrial Area Development Activity (2004)

Legend

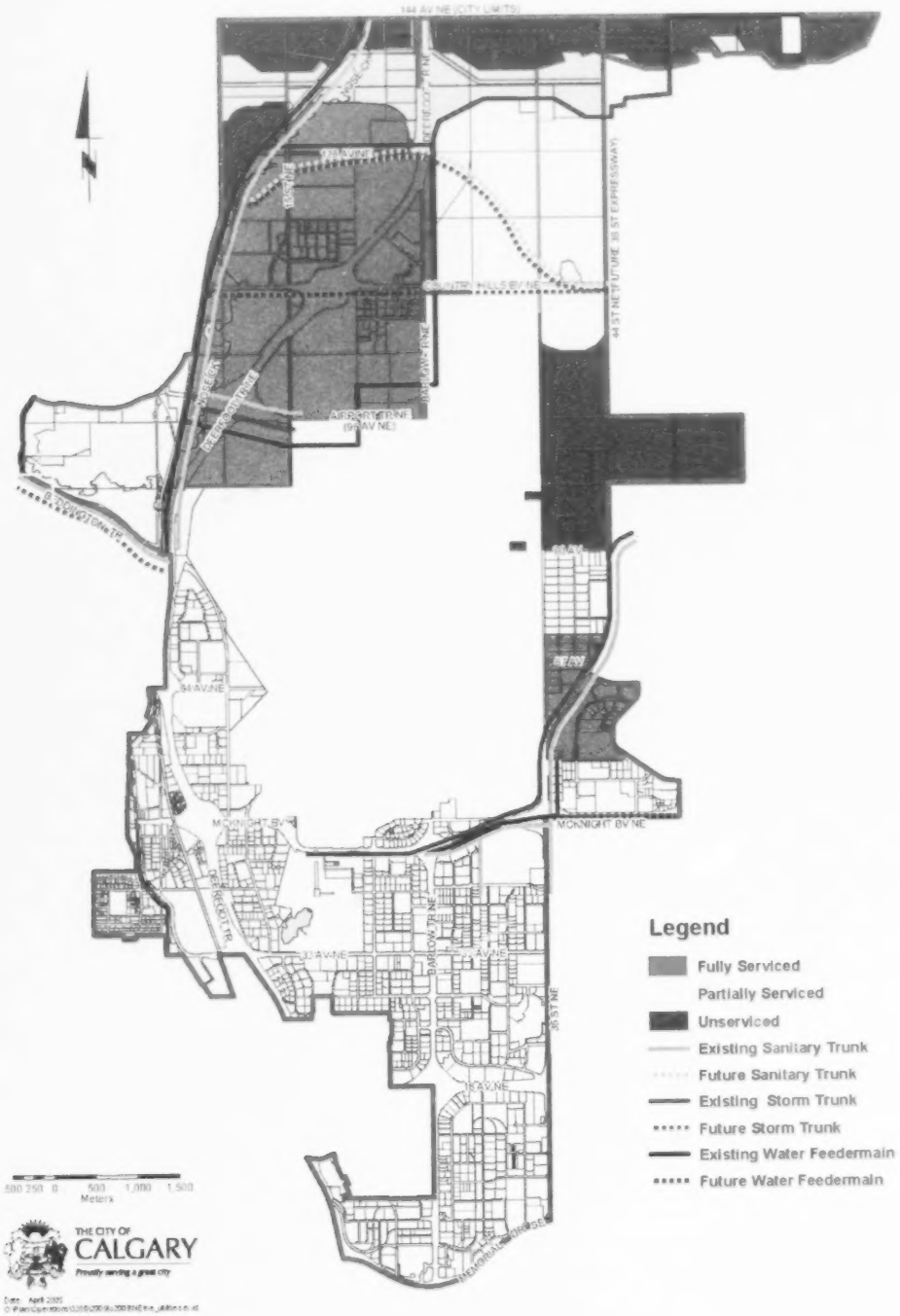
Estimated $ Value of Building Permit

- < $500 K
- $500K - $1M
- $1M - $ 5M
- > $5M

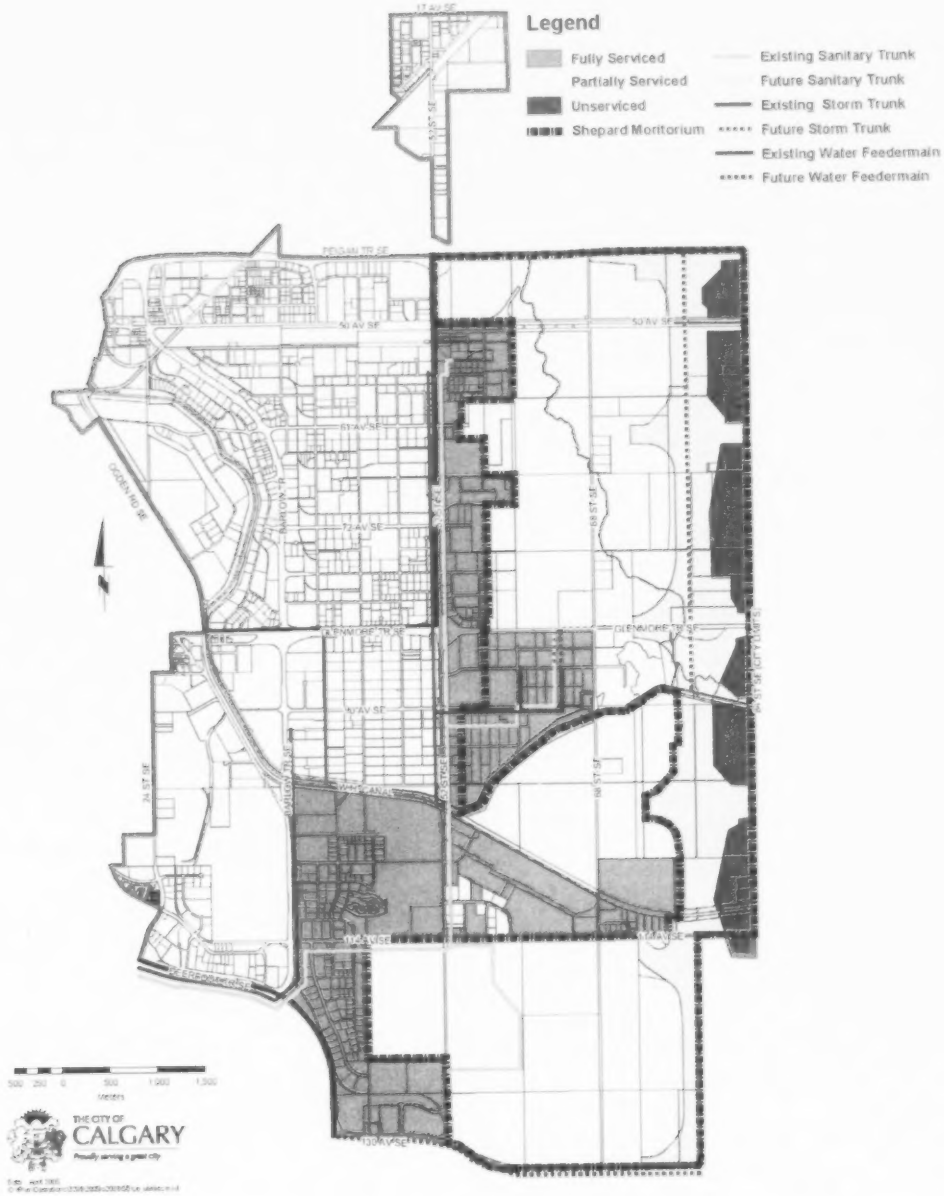
General Building Permit Category

- Commercial
- Government
- Industrial
- Institutional

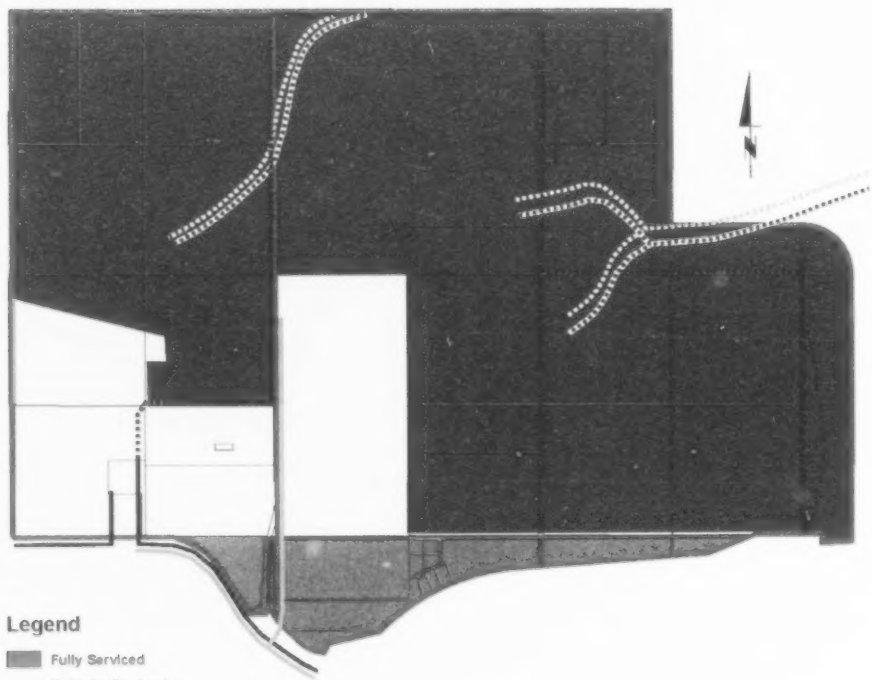
Map 19: North/Northeast Industrial Area Storm, Sewer and Water Servicing



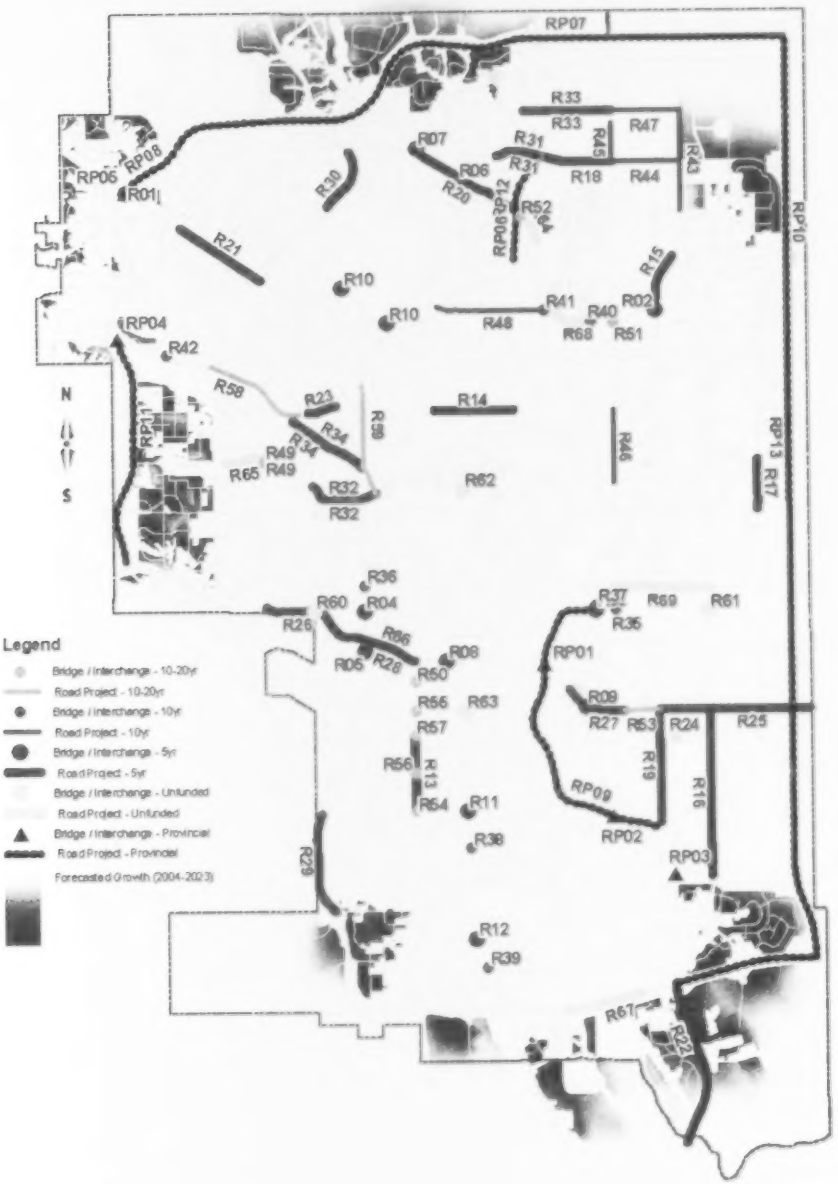
Map 20: Southeast Industrial Area Storm, Sewer and Water Servicing



Map 21: Northwest Industrial Area Storm, Sewer and Water Servicing



Map 22: Transportation Growth-Related Capital Projects: 2005-2014



Transportation Growth-Related Capital Projects 2005-2024

CAPITAL PROJECTS

MAPREF	DESCRIPTION	Short Term 2005-2009 (5yr)	MidTerm 2010-2014 (10yr)	Long Term 2015-2019 (15yr)	Long Term 2020-2024 (20yr)
R01	CROWCHILD TR / STONEY TR INTERSECTION	237	0	0	0
R02	16TH ST NE/MCKNIGHT NE INTERCHANGE (INCL FLYOVER)	46,854	0	0	0
R03	52 AVE S OGDEN RD INTERCHANGE	43	0	0	0
R04	50TH AVENUE/ CROWCHILD TRAIL INTERCHANGE	1,680	0	0	0
R05	61 AVENUE PEDESTRIAN OVERPASS	1,356	0	0	0
R06	BEDDINGTON TRAIL/WEST HILLS BV RAMPS	64	0	0	0
R07	BEDDINGTON TRAIL/ COUNTRY HILLS BLVD INTERCHANGE	36,900	0	0	0
R08	CONSTRUCTION OF GLENMORE/CROWSNTH STREET INTERCHANGE	71,599	0	0	0
R09	GLENMORE TR/69 ST SE INTERCHANGE	1,124	0	0	0
R10	JOHN LAURIE BV AT 19 ST/BRISBOIS DR OVERPASS	1,694	0	0	0
R11	MACLEOD TR/ANDERSON RD INTERCHANGE	201	0	0	0
R12	SHAWNESSY BLVD/MACLEOD TR INTERCHANGE	3,109	0	0	0
R13	14 ST SW 90 AVE - ANDERSON RD WIDENING	9,000	0	0	0
R14	16 AV N 6 ST E - 10 ST W	26,612	0	0	0
R15	36 ST NE NORTH OF MCKNIGHT BV - 64 AV	5,951	0	0	0
R16	52 ST E GLENMORE TR - 130 AVE S	16,756	0	0	0
R17	68 ST SE MEMORIAL DR - 17 AV TWINNING	2,952	0	0	0
R18	96 AVE DEERFOOT TR - BARLOW TR	36	0	0	0
R19	BARLOW TR GLENMORE TR - DEERFOOT TR	180	0	0	0
R20	BEDDINGTON TR DEERFOOT TR - COUNTRY HILLS BV	8,935	0	0	0
R21	CROWCHILD TR 53 ST - NOSE HILL DRIVE	9,992	0	0	0
R22	DEERFOOT TR EXTENSION & UPGRADING	7,797	0	0	0
R23	FOOTHILLS/CHILDREN'S HOSPITAL CONNECTOR/TCH	2,500	0	0	0
R24	GLENMORE TR SE 52 ST - BARLOW TR	1,196	0	0	0
R25	GLENMORE TR 52 ST - 94 ST E	5,546	0	0	0
R26	GLENMORE TR CROWCHILD TR - SARCEE TR	10,926	0	0	0
R27	GLENMORE TR OGDEN RD-BOW RIVER STRUCTURE	18,500	0	0	0
R28	GLENMORE TRAIL 14TH STREET W TO CROWCHILD TRAIL A	1,675	0	0	0
R29	SARCEE TR@FISH CREEK/ANDER RD-146 AVE	3,504	0	0	0
R30	SHAGANAPPI TR EDGEMONT BV - CHB	3,730	0	0	0
R31	96TH AVENUE N DEERFOOT TR TO HARVEST HILLS LK	12,900	4,600	0	0
R32	BOW TR CROWCHILD TR - 37 ST W	3,000	7,000	0	0
R33	CHB BARLOW TR - COVENTRY BV	1,500	9,700	0	0
R34	FARNDALE BV TRANSCANADA HWY - CROWCHILD TR	300	3,700	0	0
R35	BARLOW TRAIL & 50TH AVENUE	0	15,000	0	0
R36	CROWCHILD & FLANDERS INTERCHANGE UPGRADE	0	10,900	0	0
R37	DEERFOOT TR & 50 AVE SOUTH	0	20,000	0	0
R38	MACLEOD TR / LAKE FRASER GATE INTERCHANGE	0	17,600	0	0
R39	MACLEOD TRAIL / 162 AVE INTERCHANGE	0	25,000	0	0
R40	MCKNIGHT / 19 ST INTERCHANGE	0	15,000	0	0
R41	MCKNIGHT BV / 12 ST INTERCHANGE	0	15,000	0	0
R42	TCH / BOWFORT ROAD INTERCHANGE	0	39,600	0	0
R43	36 ST EXPRESSWAY 80 AVE N TO COUNTRY HILLS BLVD	0	25,200	0	0
R44	96 AVENUE BARLOW TR - 36 STREET NE	0	65,000	0	0
R45	BARLOW TR 112 AV - AIRPORT TR	0	1,500	0	0
R46	BARLOW TR MEMORIAL DR - 16 AV	0	7,000	0	0
R47	COUNTRY HILLS BLVD BARLOW TR TO 36 ST EXPRESSWAY	0	88,000	0	0
R48	MCKNIGHT BV 12 ST E - 4 S	0	41,000	0	0
R49	SARCEE TR CORRIDOR IMPROVEMENTS	0	30,000	140,000	0
R50	14TH STREET W/ 77TH AVENUE INTERCHANGE	0	0	20,000	0
R51	MCKNIGHT BLVD / BARLOW TRAIL INTERCHANGE	0	0	30,000	0
R52	BEDDINGTON TRAIL / BEDDINGTON BLVD AND 11TH STREET	0	0	32,000	0
R53	GLENMORE TR OGDEN RD TO BARLOW TR	0	0	100,000	0
R54	14TH STREET / ANDERSON ROAD INTERCHANGE	0	0	0	40,600
R55	14TH STREET HERITAGE DRIVE INTERCHANGE	0	0	0	30,900
R56	14TH STREET/ SOUTHLAND DR INTERCHANGE	0	0	0	30,100
R57	14TH STREET W/60TH AVE S INTERCHANGE	0	0	0	29,800
R58	TRANS CANADA HIGHWAY SHAGANAPPI TR TO SARCEE	0	0	0	37,500
R59	CROWCHILD TR CORRIDOR 24 AV N TO 14 AV S	0	0	0	300,000
Rx	ASSET MANAGEMENT SYSTEM	2,000	0	0	0
Rx	MACLEOD TRAIL WIDENING	2,139	0	0	0
Rx	MACLEOD TR WIDENING-TRAFFIC INFRASTRUCTURE UPGRADE	681	0	0	0

Transportation Growth-Related Capital Projects 2005-2024

Rx	HANSON SIGNING INVENTORY/WORK ORDER SYSTEM	17	0	0	0
Rx	OPERATIONAL IMPROVEMENT PROJECTS	35,170	0	0	0
Rx	SOUTH FOOTHILLS	11,625	0	0	0
Rx	MAJOR ROAD OVERSIZE	2,278	0	0	0
Rx	PEDESTRIAN OVERPASSES	3,106	20,680	0	0
Rx	DEVELOPMENT OF ACCESS ROADS	34,629	16,200	0	0
Rx	TRAFFIC SIGNALS-DEVELOPER WORK	7,430	6,795	0	0
Rx	FUTURE PROJECTS/TRANSP. SYS. MANAGEMENT	4,000	5,000	0	0
Rx	STREETLIGHT O/T NEW DEVELOPMENT	649	340	0	0
Rx	TOP LIFT PAVING-VARIOUS LOCATIONS	4,697	4,700	0	0
Rx	FUTURE LAND	14,155	7,560	0	0
Rx	36 AVENUE SOUTH CONNECTOR	0	0	100,000	0
Rx	PROGRAMABLE MESSAGE BOARD	0	0	90	0
Rx	PRIVATE SUBDIVISION CONSTRUCTION	6,456	8,570	7,500	7,500
Rx	VIDEO SURVEILLANCE SYSTEM	0	0	1,250	1,250
Rx	WEB SITE ENHANCE & DATABASE INTEGRATION FOR GIS	0	0	250	250
Rx	TRAFFIC COUNTERS	0	0	750	750
Rx	IT/STDM PROJECTS	7,748	34,060	25,000	25,000
Rx	NEW TRAFFIC SIGNALS & PED CORRIDORS	10,229	10,924	4,080	4,080
Rx	FREEWAYS	0	2,500	600	700
	Total:	*465,858*	*558,029*	*461,520*	*508,330*

UNFUNDED

MAPREF	DESCRIPTION	Short Term 2005-2009 (5yr)	MidTerm 2010-2014 (10yr)	Long Term 2015-2019 (15yr)	Long Term 2020-2024 (20yr)
R60	GLENMORE TRAIL / 37TH STREET INTERCHANGE	25,000	0	0	0
R61	52 ST E & CPR TRACKS	16,000	0	0	0
R62	4TH STREET UNDERPASS	26,000	0	0	0
R63	MACLEOD TR & HERITAGE DR	55,000	0	0	0
R64	11 ST NE: DEERFOOT TR - NORTH OF 68 AV	3,700	0	0	0
R65	BRW T. SARCEE TR TO STRATHCONA BLVD	6,000	0	0	0
R66	GLENMORE TR: 14 ST W TO CROWCHILD TR	40,000	0	0	0
R67	HWY 22X: MCKENZIE LAKE BLVD TO CHAPARRAL BLVD	22,100	0	0	0
R68	MCKNIGHT BV NE: 12 ST - 19 ST	10,400	0	0	0
R69	PEIGAN TR: BARLOW TR - 52 ST E	9,000	0	0	0
Rx	SPATIAL DATA MODEL/GIS DATA VIEWER	220	0	0	0
Rx	PEDESTRIAN OVERPASSES	10,000	0	0	0
Rx	WEB SITE ENHANCE & DATABASE INTEGRATION FOR GIS	250	0	0	0
Rx	VIDEO SURVEILLANCE SYSTEM	500	0	0	0
Rx	TRUCK TEMPERATURE SENSOR/ROAD SURVEY EQUIP	50	0	0	0
Rx	TRANSPORTATION SYSTEM MANAGEMENT PROJECT (TSM)	10,000	0	0	0
Rx	TRAFFIC COUNTERS	200	0	0	0
Rx	PRIVATE SUBDIVISION CONSTRUCTION	2,500	0	0	0
Rx	PROGRAMABLE MESSAGE BOARD	500	0	0	0
Rx	FREEWAYS	2,500	0	0	0
Rx	OPERATIONAL IMPROVEMENT PROJECTS	12,500	0	0	0
Rx	NEW TRAFFIC SIGNALS & PED CORRIDORS	2,350	0	0	0
Rx	IT/STDM PROJECTS	24,000	0	0	0
Rx	INTELLIGENT WORK ZONE TRAFFIC MANAGEMENT	950	0	0	0
Rx	FUTURE LAND	10,000	0	0	0
Rx	COLLISION ANALYSIS SYSTEM	500	0	0	0
Rx	STREETLIGHT SPATIAL MAINT PROJECT	350	0	0	0
	Total:	*290,570*	*0*	*0*	*0*
	Grand Total:	*756,428*	*558,029*	*461,520*	*508,330*

(All figures in $ 000's)